

Mentoring Program Sustainability Plan Template

IOWA DEPARTMENT OF PUBLIC HEALTH
MENTORING PARTNERSHIP OF MINNESOTA
MENTOR CONSULTING GROUP



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Instructions

The following workbook will lay the foundation for developing a sustainability plan. The activities will assess your current situation, internally and externally, so you have a firm understanding of your organizational identity, your strengths, and how to communicate that to funders and individual donors. Every organization is unique, so approach these tasks with some flexibility.

The template is divided into topics. Each topic includes planning exercises as well as questions. Please complete each planning exercise and compile the question answers and exercises into a sustainability packet. If your organization already has the required item or something similar, please update and use the pre-existing document. The complete list of questions is at the end of the template (pg. 34).

As you work on this review, gather together documents that can provide the information you need:

- Your common grant application
- Agency and program budgets detailing all sources of funding
- Your most recent annual report
- Board of Directors roster, their skills and connections in the community
- Policy and procedure manuals
- Data on program outcomes
- Your organization's strategic plan

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Introduction

Sustainability, capacity building, resource development, fundraising—these are terms that often are used interchangeably to describe the work that nonprofit organizations do to survive and thrive.

Sustainability in the context of a mentoring program refers to the overall stability of the organization: its ability to weather temporary challenges, provide quality services in the present, and maintain a solid foundation for its future. Sustainability is impacted by all the key activities and functions of an organization and all major activities are, in turn, affected by the ability of an organization to sustain itself (The National Mentoring Center).

The process of sustainability planning starts with reviewing your resources and environment. Taking stock of the internal and external resources your organization has at its disposal.

Capacity-building is the process by which an organization strengthens its foundations in order to increase its ability to carry out its mission. Agencies with strong organizational capacity are more likely to be sustainable.

Sustainability requires a plan for services and practices that result in positive outcomes for children and youth as well as a plan for sharing the positive impact you create with your stakeholders in the community. Sustaining a mentoring program requires understanding the systems in which it operates (e.g., schools, foster care, the juvenile justice system), as well as the relevant policies and infrastructures that foster internal quality and stability

Getting the ball rolling is often the hardest part of sustainability planning because it requires reflection, time, conversation, and energy. It is important to note that this process isn't necessarily linear and that the plan you develop is, and should be, a living document that requires frequent updates and adjustments to remain effective.

Mission/Vision/Values

Unless your organization can clearly articulate its purpose, you may struggle to stay on point and procure resources that are a good fit for your values. Mission and vision statements establish the long-term direction and goals that guide a nonprofit's operations. They provide a foundation for a nonprofit's programs, services, communications, organization and culture and create a shared vision for your staff, board members, and other stakeholders.

Developing a Mission Statement (Adapted from the Field Guide to Nonprofit Strategic Planning and Facilitation)

- The mission statement describes the overall purpose of the organization. It is one-sentence that describes why an organization exists.
- When wording the mission statement, consider the organization's products, services, markets, values, concern for public image, and priorities of activities.
- When refining the mission, a useful exercise is to add or delete a word from the mission to realize the change in scope of the mission statement and assess how concise is its wording.
- Does the mission statement include sufficient description that the statement clearly separates the mission of the organization from other organizations?

Developing a Vision Statement (Adapted from the Field Guide to Nonprofit Strategic Planning and Facilitation)

- The vision statement includes vivid description of the organization as it effectively carries out its operations. It is a one-sentence statement describing the clear and inspirational long-term change resulting from your work. It can be a motivational tool.
- Developing a vision statement can be quick culture-specific, i.e., participants may use methods ranging from highly analytical and rational to highly creative and divergent, e.g., focused discussions, divergent experiences around daydreams, sharing stories, etc.
- Questions to consider include: What are the major issues and problems? Why should those issues be addressed? What are the strengths and assets of our organization? Of those being served? What is your dream end-state? What does success look like?

Developing a Values Statement (Adapted from the Field Guide to Nonprofit Strategic Planning and Facilitation)

- Values represent the core priorities in the organization's culture, including what drives members' priorities and how they truly act in the organization, etc. Values are increasingly important in strategic planning.
- Establish four to six core values from which the organization would like to operate. Consider values of clients, shareholders, employees and the community.

Our mission statement is:

Our vision statement is:

Our values are:

Internal & External Assessment – SWOT Analysis

Consider whether there has been changes in your environment – either within your organization or an external factor such as an economic downturn or boom. It is likely that changes in the environment, both internal and external, will have an impact on your own work as well as potential funders. . Fill out the SWOT Analysis worksheet (example on page 7) with the categories below:

Strengths and Weaknesses

What you write under these two sections will help you to look internally at your organization to figure out what it is you're capable of doing and where there's room for improvement. Your strengths can include things that make your initiative unique, your experience and knowledge, and the quality and reputation of your organization.

When it comes to the weaknesses section of your SWOT, you should incorporate areas that need the most work. This could include a gap in skills, staffing issues, or motivational problems throughout your organization. From determining your weaknesses you'll be able to fix any issues within your nonprofit, and ensure that your staff is motivated and involved.

Opportunities and Threats

Many organizations are great at looking within, but find it more difficult to examine external factors. The opportunities and threats sections force you to focus on the conditions of the real world and how they affect your initiative. Opportunities can include partnerships you can make in the community, ways to reduce costs, and ideas for diversifying the organization. The threats section should include any possible changes in the community that could negatively impact your initiative, any strong competitors, and things such as seasonality.

Sustainability Questions:

1. What is the funding climate in which your program takes place?
2. What strengths stand out as being most useful for ensuring sustainability in your program?
3. What challenges did you find that may inhibit the effort?
4. What are available resources and needed resources for continued success?



Logic Model

A logic model is a planning tool to clarify and graphically display what your organization plans to accomplish and impact. What do we do and how do we go about it? It is a tool used by funders, managers, and evaluators of programs for planning, implementation, and evaluation. Fill out the Logic Model template on page 9 with the categories below:

1. **INPUTS:** resources, contributions, investments that go into the program
2. **ACTIVITIES:** what the program does with the inputs to fulfill its mission
3. **OUTPUTS:** services, events and products that reach people who participate or who are targeted
4. **OUTCOMES:** results or changes for individuals, groups, communities, organizations, communities, or systems
5. **IMPACT:** impact refers to a broader effect than outcomes – perhaps the effect participation had on ability to make an informed choice, empowerment or wider life experiences. Impact is also a longer term effect than an outcome.

Sustainability Questions:

5. Is there any research showing that your activities lead to your targeted outputs and outcomes?
6. What might get in the way of your activities leading to your outcomes? How can you prevent this?
7. How will your organization continue to conduct sustained program planning?
8. How will logic models be used in future efforts?

Inputs	Activities	Outputs	Outcomes	Impact

Program Evaluation

Mentoring program evaluation serves many functions, including providing timely information to aid in managing day-to-day program aspects and measuring the program's impact on mentees. Evaluation data can also be used to demonstrate to stakeholders and the community at large that the program is effective and worth sustaining. Complete a basic Evaluation Plan using the template on page 11 or attach your organization's Evaluation Plan.

Sustainability Questions:

9. What are your most compelling outcomes to date? Use your most recent evaluation or program data, as well as anecdotal success stories.
10. How will your organization continue to evaluate outcomes?
11. What if any changes would you make to your evaluation tools or processes?
12. What data or information systems help you support this evaluation?

SAMPLE: Evaluation Plan Worksheet

By: Colorado Nonprofit Association

Program:						
	Indicator/Performance Measures	Who has this information?	What evaluation tool are we using?	When will it be measured?	Who will measure it? / Who will review it?	
Output 1. _____ 2. _____						
Short-Term Outcome 1. _____ 2. _____						
Long-Term Outcome 1. _____ 2. _____						
Impact 1. _____						

Implementation of Quality Program Activities

Mentoring programs are more likely to reach their desired outcomes when they employ evidence-based best practices in their program design and mentoring operations. Quality analysis looks at your program's adherence to these best practices, based on The Elements of Effective Practice for Mentoring. Complete the following National Quality Mentoring System Self-Assessment Tool (page 13) which will look at your internal strengths, challenges, and opportunities. If areas of significant concern emerge, such as a lack of commitment to the project by top-level administration, you will likely need to work on these before launching a fundraising effort. Similarly, areas of strength that emerge, such as a committed working Board of Directors, can help drive implementation of your plan.

Sustainability Questions:

13. Which program activities are being conducted with a high level of intentionality with regards to quality and best practices?
14. What activities are not yet in practice or not yet being conducted with intentionality?
15. What are the training and technical assistance needs of staff?

NATIONAL QUALITY MENTORING SYSTEM SELF-ASSESSMENT TOOL

PROGRAM DESIGN AND PLANNING

- ☐ 1. Do you detail your overall program mission, goals and outcomes for mentees, mentors and other key stakeholders?
- ☐ 2. Do you have a Financial Plan?

PROGRAM MANAGEMENT

- ☐ 3. Do you have a program Policies and Procedures Manual that includes a section on risk management?
- 4. Please check which of the following practices you are currently implementing:
 - ☐ Advisory Group
 - ☐ A system for managing program information, such as mentor and mentee personal data
 - ☐ A system to monitor the overall program
 - ☐ Professional development for staff
 - ☐ An up-to-date resource development plan
 - ☐ A practice of advocating for mentoring
 - ☐ A public relations/communications effort

PROGRAM OPERATIONS

5. STANDARD 1: RECRUITMENT

- ☐ 6. Do you engage in mentor recruitment strategies that realistically portray the benefits, practices and challenges of mentoring in the program?
- ☐ 7. Do you recruit youth whose needs best match the services offered by the program and helps them understand what mentoring is and what they can expect from a mentoring relationship?

8. STANDARD 2: SCREENING

- ☐ 9. Do your mentors complete a written application?
- ☐ 10. Do your mentors agree to a one year (calendar or school) minimum commitment for the mentoring relationship?
- ☐ 11. Do your mentors agree to participate in in-person meetings with the mentee that average once a week and one hour per meeting? (May be combination of in person and online; may be less than once a week but more than one hour per meeting.)
- ☐ 12. Do you conduct a pre-match in-person interview with potential mentors?

- ☐ 13. Do you conduct a reference check on potential mentors?
- ☐ 14. Do you conduct a comprehensive criminal background check on adult mentors, including searching a national criminal database and sex offender registry?
- ☐ 15. Do parents/caregivers complete an application and provide informed consent for their child to participate?
- ☐ 16. Do parents/caregivers and mentees agree to a one year (calendar or school) minimum commitment for the mentoring relationship?
- ☐ 17. Do parents/caregivers and mentees agree that mentees will participate in required meetings that average once a week and one hour per meeting? (May be combination of in person and online; may be less than once a week but more than one hour per meeting.)

18. STANDARD 3: TRAINING

- ☐ 19. Do you provide a minimum of two hours of pre-match, in-person training for mentors?
- ☐ 20. Do you provide a pre-match mentor training? If yes, does the mentor training include the following topics, at a minimum: (Check all that apply)
 - ☐ Program rules
 - ☐ Mentor goals and expectations for mentor/mentee relationship
 - ☐ Mentor obligations and appropriate roles
 - ☐ Relationship development and maintenance
 - ☐ Ethical issues that may arise related to the mentoring relationship
 - ☐ Effective closure of the mentoring relationship
 - ☐ Sources of assistance available to support mentors
 - ☐ Other
- ☐ 21. Do you have an Orientation/Training handbook for Mentors?

22. STANDARD 4: MATCHING

- ☐ 23. Do you consider your program goals, as well as the characteristics of the mentor and mentee when making matches?
- ☐ 24. Do you arrange and document an initial meeting between the mentor and mentee?

25. STANDARD 5: MONITORING AND SUPPORT

- ☐ 26. Do you contact the mentor and mentee at a minimum frequency of twice per month for the first month of the match and monthly thereafter?

- ☐ 27. Do you document information about each mentor-mentee contact, including, at minimum, date, length and nature of contact?
- ☐ 28. Do you provide mentors with access to at least two types of resources to help mentors negotiate challenges in the mentoring relationship as they arise?
- ☐ 29. Do you follow evidence-based protocols to elicit more in-depth assessment from the mentor and mentee about the relationship and uses scientifically-tested relationship assessment tools?
- ☐ 30. Do you provide one or more opportunities per year for post-match mentor training?

31. STANDARD 6: CLOSURE

- ☐ 32. Do you have a procedure to manage **anticipated** closures, including a system for a mentor or mentee rematch?
- ☐ 33. Do you have a procedure to manage **unanticipated** match closures, including a system for a mentor or mentee rematch?
- ☐ 34. Do you conduct and document an exit interview with each mentor and mentee?

PROGRAM EVALUATION

- ☐ 35. Do you have a plan to measure program process? If yes, does it include: (Check all that apply)
 - ☐ Indicators of program implementation viability and volunteer fidelity, such as training hours, meeting frequency and relationship duration
 - ☐ A system for collecting and managing specified data
- 36. Does your plan to measure expected outcomes
 - ☐ Specify expected outcomes
 - ☐ Select appropriate instruments to measure outcomes
 - ☐ Select and implement an evaluation design
- 37. Do you have a process to reflect on and disseminate evaluation findings? If yes, check all that apply below:
 - ☐ Refine the program design and operations based on the findings – if warranted
 - ☐ Develop and deliver reports to program constituents, funders and media yearly, optimally, each quarter

Community Partnerships

Your mentoring program probably has both formal and informal partnerships with people and organizations in the community. These include your primary stakeholders: your families, volunteers, staff, and leadership. Start to map your organization's partnership by completing a Relationship Map (pg 17). Formal partnerships could be between schools or other educational agencies and one or more community- or faith-based organizations. These may be financial or nonfinancial agreements to carry out certain parts of the mentoring service, and obligations under the agreement are spelled out in a memorandum of understanding (MOU) or financial contract. Your agency may also have informal partners—organizations that support your work and see its value to their own mission. For example, a tobacco prevention program in the schools may refer young people or volunteers to your mentoring program and will seek opportunities to present their information to your mentors and mentees through invitations to events or coming to your mentoring training sessions. Your current business supporters should also be included in your assessment of partnerships. Their contributions may range from allowing you to place posters on their bulletin boards to making regular financial contributions to your program.

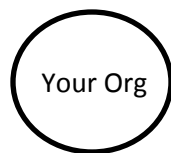
Sustainability Questions:

16. Which community partnerships would you like to enhance? To what benefit?
17. How will you engage these new relationships?
18. Which community partnerships are no longer serving your organization?
19. How does your organization maintain positive relationship with community partners?

Relationship Mapping

This activity begins to help your organization understand all the people and organizations that already care about your work and support you in a variety of ways. Webs are visual maps that show how different categories of information relate to each other. They provide structure for ideas and facts and provide a framework for organizing and prioritizing information. Links from the center 5-will connect your key stakeholders and core constituencies as well as track details of their connections to you.

1. Draw a circle, in the middle write the name of your program
2. Write down all the names of organizations and groups of individuals that have a connection to your program. Don't limit yourself!
3. Spend a few minutes listing all the resources that each group has along the line connecting them to you (knowledge, experience, access, space, ideas, MONEY)
4. Spend some time discussing/jotting down notes on the self interests of the people and groups. Why are they connected to your program? What's in it for them?



Marketing

Your program exists to provide quality mentoring services that support the mission of your agency. However *Image* becomes important as soon as you need to acquire something, such as participants (youth, school staff, mentors, etc.) or funding to run your program. It is important to actively choose and manage your program's image among your various target audiences for effective sustainability. You must present your program in a way that will compel others to buy into it.

It is critical to communicate about your mentoring program to prospective mentors and mentees, school administrators and staff, parents, youth-serving agencies, community leaders, and other stakeholders. Communicating the success of your program enhances community awareness of the positive impact of mentoring and can also help to engage program partners and current and potential funders, which can lead to new collaborations, funding, and further enhancements to the program.

Communications and Marketing involves identifying the key audiences to be reached (pg. 20), creating simple communications messages that appeal to those audiences (pg. 20), and identifying and employing the most effective communications channels (e.g., Internet, e-mail, social media, public meetings, print materials, radio) to reach and engage your key program's audiences in a comprehensive plan (pg. 22).

Sustainability Questions:

20. What marketing strategies have proved most successful at bringing in resources and enhancing your sustainability?
21. How does your organization measure the impact of its marketing efforts?

Key Messages

According to Access Philanthropy, Key Messages are a set of statements that are the most important things about us to make the biggest impact to a specific audience. (Not necessarily the most important to us!). There are a lot of ways you can communicate about the same thing. What do they want to hear and what do you want to say to get the attention or support you want and need? Choose three key audiences that your mentoring program communicates with in hopes of support, resources, or partnership. What is important to them?

Examples of stakeholders include: Students, parents, and families, Educators – principals, school superintendents, teachers, Government and political leaders, State or federal legislators, Representatives from cultural and ethnic groups, Leaders in business, Local funders, Representatives from faith-based organizations, Media representatives, and more...

The test of a good key message – Is it:

– True? – Unique? – Short? – Human? – Memorable? – Persuasive?

Audience 1:

Key Message:

Audience 2:

Key Message:

Audience 3:

Key Message:

Marketing Planning

A marketing plan will help ensure the success of your mentoring program by engaging stakeholders in and shaping the way the effort is perceived by everyone invested in or affected by this issue. Your communication plan can help you raise public awareness of your needs, challenges, and successes, and obtain needed funding, support, and volunteers. Please fill out the Marketing Plan on the following page or attach your organization's marketing or communications plan.

Your marketing action plan should provide clear, concise direction for your marketing efforts and help you to measure the success of your efforts. The action plan should do all of the following:

- State the broad marketing object (e.g., awareness, fundraising, volunteer recruitment) and tactics (specific activities selected to implement the strategies) you plan to use such as tabling, handing out brochures, sending an email blast, or writing a press release.
- Establish target dates for each activity;
- Assign responsibilities and define individuals' involvement

The methods and techniques chosen to include in the action plan will depend on your community, programming, technology, and skillsets.

Marketing Plan

Audience	Objective	Tactic/Method	Materials Required	Frequency	Responsible Party

Financial Infrastructure

To ensure adequate funding for a program's long-term sustainability, practitioners have to engage in many activities. For optimal program viability, organizations should be organizationally healthy with a strong Board of Directors, solid financial practices, and structured development policies. The following two checklists, from *The Handbook of Youth Mentoring*, 2nd Edition, provide an overview of some of the requirements to have a strong infrastructure for fundraising including staff, volunteer, and Board support. They are followed by a third checklist from the Nonprofit Finance Fund to assess your revenue, expenses, profitability, health, liquidity, and financial planning. Please complete the checklist and answer questions when prompted, when applicable.

Checklist for Practitioners: Planning Phase of Funding a Mentoring Program

(Handbook of Youth Mentoring, Second Edition)

- ☐ Does the agency currently have 501(c)(3) tax-exempt status? If not, who is an expert on your board or in the community that you could rely on to assist in completing the paperwork to achieve this status?
- ☐ How much of the revenue coming in to the agency has conditions attached to how it is spent? How much of the revenue is restricted? Do you receive funding from many sources rather than just one such as a federal grant? How much money can you rely on as secured funding year after year?
- ☐ Does the board of directors represent a broad cross-section of community members with expertise and contacts? Has each members indicated how he or she can assist in the fundraising process, when, and with whom?
- ☐ Do you have any members of the board who do not have term limits? How will you now bring on new members and retire those who are not doing the job required of an effective board member?
- ☐ If 100% of the members on your board do not give yearly to the program, how will you change this? If you do not like to ask your board for money, do you have a board chair who can take on this important assignment after making his or her own donation?
- ☐ Are you able to identify a team of volunteers and board members who have the time, interest, and expertise to assist the program manager with the agency's fundraising efforts?

Checklist for Practitioners: Funding Sources for Mentoring Programs

(Handbook of Youth Mentoring, Second Edition)

- ☐ What challenges will you encounter in identifying board members and other volunteers to help the manager to seek multiple sources of funding?
- ☐ Who will monitor the federal register for Requests for Proposals for federal grants?
- ☐ What kind of tracking system will you need to develop to collect data and to monitor contacts with revenue sources and results of your efforts?
- ☐ Do you track alumni of your mentoring program – mentors and mentees – and ask them to help fund your program?
- ☐ Do you have a champion among local, state, or federal legislators?
- ☐ Do you have a list of companies with a strong history of support for your program that could now provide you with program funding?
- ☐ Is your agency a member of the Chamber of Commerce? Will you encounter any resistance to joining from your local board or others?
- ☐ Do you have an attorney and an insurance agent on your board who can provide professional advice in areas such as insurance for special events and planned giving?
- ☐ What policies will you put in place around fundraising?
- ☐ How will you rank in terms of your timeliness for saying “thank you” to donors?
- ☐ What will you need to do to prepare for rejection?



This worksheet reveals some of your nonprofit's financial strengths and weaknesses. If you answer **Yes** to many questions, you're likely weathering the economic climate well and have a good grasp of your financial dynamics. If you're answering **No** or **Not Sure** often, you may want to review what actions you are or could be taking to manage areas of concern. Match your answers to the **Priority Level** you assign to the question to identify which may be the most pressing concerns.

With support from your funders, NFF can help you interpret the results and consider next steps. You can then develop a clear financial plan to share with board members, funders and others.

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Core Areas of Nonprofit Finance	Y	N	Not Sure	Not WA	Priority: High, Med, Low	Brainstorming What is our current strategy for handling this concern? What's the next step?
Revenue: How might the reliability of revenue streams continue to be affected in the current economic climate?						
Is our revenue mix (earned AND contributed) relatively predictable and reliable over time?						
Are our government contracts stable and reliably unaffected by state/local budget cuts?						
Will our foundation giving and/or corporate support remain stable or grow?						
Are our major donors still reliable? Can we count on their support at current levels?						
Can we rely on our Board to help cover any funding losses?						
Have we identified additional sources of support to make up for funding declines elsewhere?						
Have we updated our fundraising message to include the strongest, most urgent case for success?						
If in the midst of a capital campaign, are we still meeting fundraising targets? If not, have we considered phasing the campaign or a Plan B?						
Expenses: Will costs have to be cut? If so, which costs?						
Have we identified where we can cut costs without harming critical programs and operations?						
Can we still maintain our existing staff numbers and salaries?						
Profitability: How might changes in revenue streams or expense dynamics affect the bottom line?						
Are we generating operating surpluses on a relatively consistent basis?						
Are we developing and approving budgets that keep expenses in line with our new revenue reality?						
Are our surpluses big enough to cover depreciation, meet debt obligations, and contribute to savings?						
Are we raising revenue to cover new expenses and/or higher service demand?						
Health of the Balance Sheet: How might changes in operating results affect your organization's balance sheet?						
Are we making loan payments on schedule?						
If struggling with debt, have we spoken with our bank about renegotiating terms?						
Are we paying our vendors on time?						
Are we planning for and meeting maintenance needs of our facility (or other fixed assets)?						
Are our investments safe and stable?						
Liquidity: What cash is readily available for routine and emergency needs?						
Do we have enough cash on hand to manage the cyclicalty of our daily operations?						
Do we have reserves that we can draw on to manage any shortfall?						
If reserves have been used, are we on a replacement plan?						
Financial Planning: Have you incorporated contingency planning into decision-making?						
Have we developed best, probable, and worst case revenue /expense scenarios?						
Do we project, track, and monitor cash flow on a monthly basis?						
Is our Board regularly reviewing our financial condition and encouraging rapid response to change?						
Have we considered collaboration as an opportunity to further mission and/or save costs?						

Your Funding Mix

(Center for Nonprofit Stewardship)

For optimal sustainability, multiple funding sources should be in play. This can include government funding, family foundations, corporate giving, individual donations, earned income, in-kind donations, and more. Use the following worksheet to determine your current funding mix and plan for the future.

Use your organization's current budget or last year's end-of-year Profit & Loss Statement to determine major revenue sources. Enter the amounts into the corresponding fields below. You may need to combine some items to make them fit into the categories. From this information, draw the estimated portions on the blank pie chart below.

Possible Major Revenue Sources

Fundraising

(donations, events, sponsorships, etc.)

\$ _____ %

Earned Income

(program revenue, contracted services, sales, etc.)

\$ _____ %

Membership Dues

(if a membership organization)

\$ _____ %

Grants

\$ _____ %

Investments

\$ _____ %

Other: _____

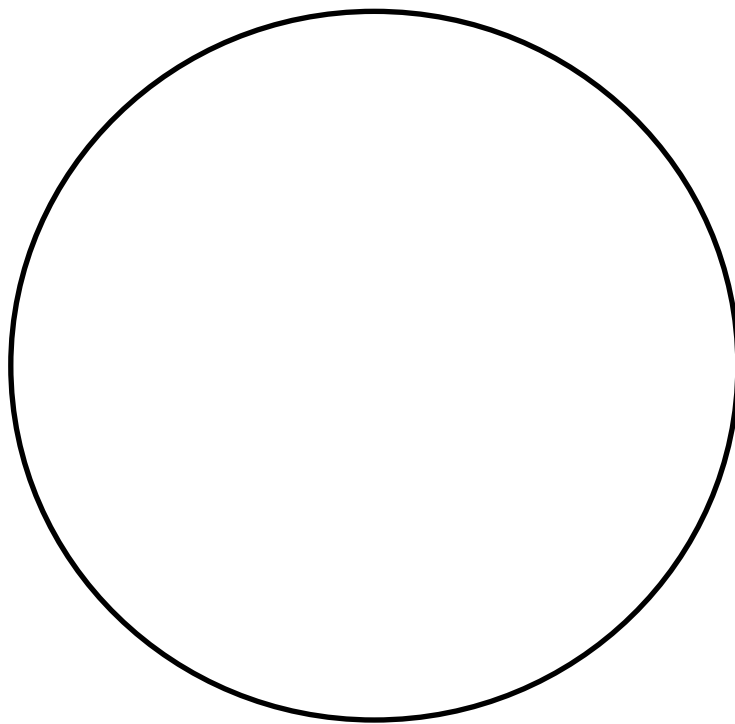
\$ _____ %

Total:

\$ _____

Revenue Pie Chart

(*to determine the %, divide the line item amount by the total)



1. Take a moment to review the findings from Part 1 (completed by your Treasurer) and consider if you are comfortable with your organization's current funding mix. Then, complete the sentences below.

What looks good here is..

What makes me
uncomfortable is...

I need more information
about...

Sustainability Questions:

22. How stable is the funding in each of your revenue sources?
23. What could affect your future funding mix?
24. Will this same funding mix work for your organization in 1, 3, 5 years?
25. What would happen if one of your major funding sources suddenly went away? What is a possible Plan B?
26. If no, what needs to be put into place now to get ahead of the transition or become more stable?
27. What is your organization's ideal funding mix?

Develop Goals and Objectives for Sustainability

By now, if you have worked through the activities above, you should have some ideas about the specific goals and measurable objectives that will lead you to a more stable and sustainable mentoring program. This is the exciting part, the building of a clear road map that will take you from knowing where you are to knowing where you want to go and how to get there.

Identifying goals and objectives can be an exciting and dynamic process for your team, and one that requires careful facilitation and enough time to really examine these important ideas. Goals should be brainstormed, discussed, and prioritized first, before you get into the more detailed work of listing specific objectives and activities. Make sure you have a clear process that will allow initial creativity and good discussion, followed by a means of narrowing the ideas into a few that respond best to your stated priorities and your assessment results. Brainstorming can be effective initially, but be sure that discussion and narrowing follow.

To create meaningful goals and objectives, keep these definitions in mind:

GOALS are broad statements that describe the change you hope to achieve. They are more abstract than objectives but they should be specific enough to allow you to know when you have achieved success.

Examples of goals, based on the sample priorities above, might be as broad as this:

- Achieve stable and diversified resources to support current service levels.

Or as specific as this:

- Replace 75 percent of federal funding with local resources to ensure continuous funding after 2007.

OBJECTIVES describe the specific, measurable, tangible steps you will take to achieve your goals.

The SMART acronym defines objectives as: **Specific** addressing the “what, when, and how much” questions; **Measurable** so that you know what it looks like when you get there; **Achievable** within the capacity of your organization to carry out the objective; **Realistic** given your current internal and external reality; **Time**-bound providing a definite end-point for accomplishing the objective

Consider this example:

- Develop a marketing toolkit that provides a consistent image of our organization to be used to recruit volunteers and solicit funds beginning January 1, 2007.

These objectives tell you what is going to happen, when it will be done, and how we will know if it has been accomplished. Objectives do not describe specific activities that will be used to achieve the desired outcome, but they do provide a framework that will help you identify specific activities, assign responsibilities, and create timelines to track progress.

Next Steps

1. With your mentoring program staff and/or agency leaders, review all of the information completed above. Identify your broad goals, specific objectives, and concrete next steps your staff can take to increase your sustainability.

If new funders and individual donors are sought, consider using the worksheet on page 33 to help you research prospects and consider whether they are a good fit.

Goal	Objective	Next Steps/Activities	Person Responsible

Goal	Objective	Next Steps/Activities	Person Responsible

Prospect Worksheet (Italics for Foundations)

Basic Information:

Name:

Address:

Contact Person:

Financial Data

Total Assets:

Total Grants Paid:

Grant Ranges/Past Donation Amounts:

Period of Funding/Project:

Is Individual/Funder a Good Match?

Subject Focus

Funder	Your Organization
1.	1.
2.	2.
3.	3.

Geographic Limits:

Type(s) of Support:

Population(s):

Type(s) of Recipients:

Application Information

Deadline(s):

Board Meeting Date(s):

Area(s) of Commonality with the Prospect

Prior giving history:

Geography:

Subject field:

People:

Other:

History of Past Cultivation (if any):

Type (letter, call, invitation, meeting, etc., and dates):

Sustainability Questions

1. What is the funding climate in which your program takes place?
2. What strengths stand out as being most useful for ensuring sustainability in your program?
3. What challenges did you find that may inhibit the effort?
4. What are available resources and needed resources for continued success?
5. Is there any research showing that your activities lead to your targeted outputs and outcomes?
6. What might get in the way of your activities leading to your outcomes? How can you prevent this?
7. How will your organization continue to conduct sustained program planning?
8. How will logic models be used in future efforts?
9. What are your most compelling outcomes to date? Use your most recent evaluation or program data, as well as anecdotal success stories.
10. How will your organization continue to evaluate outcomes?
11. What if any changes would you make to your evaluation tools or processes?
12. What data or information systems help you support this evaluation?
13. Which program activities are being conducted with a high level of intentionality with regards to quality and best practices?
14. What activities are not yet in practice or not yet being conducted with intentionality?
15. What are the training and technical assistance needs of staff?
16. Which community partnerships would you like to enhance? To what benefit?
17. How will you engage these new relationships?
18. Which community partnerships are no longer serving your organization?
19. How does your organization maintain positive relationship with community partners?

20. What marketing strategies have proved most successful at bringing in resources and enhancing your sustainability?
21. How does your organization measure the impact of its marketing efforts?
22. How stable is the funding in each of your revenue sources?
23. What could affect your future funding mix?
24. Will this same funding mix work for your organization in 1, 3, 5 years?
25. What would happen if one of your major funding sources suddenly went away? What is a possible Plan B?
26. If no, what needs to be put into place now to get ahead of the transition or become more stable?
27. What is your organization's ideal funding mix?